World Table Grape Situation and Outlook

UnitedStates total fresh market grape production in 2001 is estimated at 700,000 metric tons, down about 15 percent from a year ago. California table grape production is expected to increase 3 percent in 2001 to about 726,000 metric tons. Total production during the 2001 season for selected Northern Hemisphere table grape producing countries is expected to decline slightly. U.S. table grape exports January through August 2001 posted a 22-percent increase over the same period a year ago with strong growth to Asian markets continuing.

Northern Hemisphere

United States

The 2001 U.S. table grape crop is expected to be up about 3 percent from last year, with levels reaching approximately 726,000 tons[1]. California accounts for about 98 percent of U.S. production and about 11 percent of the world production.

Major year-over-year increases are being seen in exports of table grapes, particularly to Malaysia, Hong Kong, Indonesia and Singapore. Exports in 2001 are projected to increase 15 percent to 320,000 tons, due to increasing supply and strong demand throughout Asian markets. Likewise, the Market Access Program continues to be an important market development tool to stimulate demand and fuel table grape exports. During marketing year (MY) 2001, the U.S. Department of Agriculture/Foreign Agricultural Service and the California Table Grape Commission will share the cost of undertaking promotional activities in Asia, Latin America, and the United Kingdom. During January-August 2001, total exports reached 95,813 tons, up 22 percent from the same period in 2000. Asian markets continue their recovery from the economic crisis that began in 1998. According to the U.S. census data, Asian markets during 2000 represented about 41 percent of the total U.S. grape export market.

USDA has been working to obtain access to the Australian market for California table grapes for over ten years. Currently Australia cites concerns over the presence of the glassy winged sharpshooter and Pierce's disease in California and the market remains closed. The U.S. government believes these concerns to be scientifically unfounded, and efforts to resolve the issue are ongoing. Overall, California table grapes continue to be recognized around the world as a premium product and markets are continuing to expand.

[1]About 23 percent of California table grapes are used for processing.

During January-August 2001, imports posted a 12- percent decline at 376,389 tons over the same period in 2000. Shipments from Chile declined due to smaller yields while Mexican shipments also declined due to unfavorable weather. Although the South African Rand continued to devalue, South African shipments to the United States declined 76 percent as falling prices in South Africa and lower economic returns to producers are causing great losses to their industry.

Greece

Continued favorable weather conditions during blooming and setting of the 2001 table grape crop increased estimated production for 2001 by 10 percent to 320,000 tons. Imports of table grapes are generally small as Greece only imports to acquire specific varieties not grown in Greece and during the off-season. Most imported product comes from the EU with small quantities sourced from Argentina and Chile.

Japan

Japan's grape production during 2001 is expected to decline just over 1 percent to 234,200 metric tons. Total Japanese imports this year are estimated to be 15,000 tons, up 11 percent from last year and up 67 percent from the 9,005 tons imported during 1999. California's Red Globe grapes are establishing a strong reputation for excellent quality. Chilean grape imports are complementing U.S. shipments counter-seasonally. Year round availability has helped to boost consumption.

China

Production in calendar year 2001 is expected to be 3.80 million tons, up 16 percent from the 3.28 million tons in 2000. Acreage planted in grape vines is growing along with grape processing, particularly for wine. However, at least for the short term, China remains a net importer of grapes. Despite improving distribution and storage infrastructure for fruit, reported post -harvest gaps still exist supporting continued growth in exports of U.S. table grapes to China. At the same time, trade contacts expect China to become a major competitor to U.S. exports in the next 2 to 5 years, particularly in Southeast Asia.

Most of China's grape production is made up of 12 different major varieties, Jufeng being the most popular. Red Globe acreage is mainly located on China's east coast. Within this area, growers have experienced some disease problems. Despite reports of efforts to increase the Red Globe production base, near term competition from the Red Globe is expected to be limited .

Mexico

Unfavorable weather conditions this year put table grape production estimates down 18,370 tons from 2000. However, sources indicate that area planted has been increasing although partially offset by fallowing of older acreage. Water shortages persist and, in addition to the lack of available credit, are considered a limiting factor in expansion efforts.

Mexican consumption is improving and imports are expected to post an 11-percent increase this year. U.S. table grape exports to Mexico through July of this year totaled 1,493 metric tons, up 27 percent from the same period in 2000. The stronger peso is helping to bolster this trend. Table grape imports from Chile are expected to be 38 percent of total imported grapes while those from the United States are expected to account for the remaining 62-percent market share this year. Because of counter seasonality, Chilean shipments do not directly compete with those from the United States. Chile usually exports to Mexico in June and July, while the United States exports primarily during August through December.

Spain

Production this year is expected to decline nearly 9 percent from 2000 due to heavy May rains and higher temperatures. Imported table grapes are mainly from Chile and Italy. Given Spain's supply situation this year, imports are expected to increase. Spain, a net exporter of table grapes, has a growing season parallel with the United States so regardless of consumption patterns, little trade opportunity exists. Spain has the largest land area planted under vines. Spain exports mainly to EU countries.

Southern Hemisphere

The data for selected southern hemisphere countries has been revised in the semi-annual fresh deciduous attaché reports. Please see the grape tables in the individual fresh deciduous reports for the revised data. The fresh deciduous fruit reports containing grape data are required only for Chile, China, Greece, Italy, Japan, Mexico, South Africa, Spain, and Turkey. However, voluntary reports from other countries may also be available.

(***The FAS Attaché Report search engine contains reports on the deciduous fruit industries for more than 20 countries, including Japan, Mexico, and South Africa. For information on production and trade, contact Heather Page Velthuis at 202-720-9792. For information on marketing, contact Yvette Wedderburn Bomersheim at 202-720-0911. Also, check out our grape web page at: www.fas.usda.gov/htp/horticulture/grapes.html .)***

TABLE GRAPES: PRODUCTION, SUPPLY, AND DISTRIBUTION

Country/ Year 1/	Production 2/	Imports 3/	Total Supply	Exports, Fresh Only 3/	Domestic Fresh Consumption	For Processing	Withdrawal from Market
Northern Hemisphere Countries							
Greece							
1999	287,000	1,413	288,413	102,458	135,955	50,000	0
2000	315,878	1,955	317,833	104,151	170,694	42,988	0
2001	320,000	1,500	321,500	110,000	151,500	60,000	0
Italy							
1999	1,562,000	12,000	1,574,000	578,000	696,000	300,000	0
2000	1,568,000	14,000	1,582,000	625,000	690,000	267,000	0
2001	1,580,000	14,000	1,594,000	635,000	689,000	270,000	0
Japan							
1999	242,000	9,005	251,005	24	219,481	31,500	0
2000	237,500	13,218	250,718	23	222,695	28,000	0
2001	234,200	15,000	249,200	20	219,180	30,000	0
China; Peoples Republic of							
1999	2,708,127	25,859	2,733,986	348	2,273,248	460,390	0
2000	3,280,000	44,156	3,324,156	437	2,691,519	632,200	0
2001	3,800,000	52,408	3,852,408	752	3,015,656	836,000	0
Mexico							
1999	185,615	51,896	237,511	107,830	129,681	0	0
2000	189,370	73,744	263,114	115,414	147,700	0	0
2001	171,000	82,000	253,000	95,000	158,000	0	0
Spain							
1999	370,200	21,000	391,200	100,000	255,000	30,000	6,200
2000	351,000	19,200	370,200	111,000	236,000	20,000	3,200
2001	320,000	25,000	345,000	95,000	230,000	19,000	1,000
Turkey							
1999	3,400,000	233	3,400,233	47,980	1,652,253	1,700,000	0
2000	3,600,000	173	3,600,173	64,873	1,750,300	1,785,000	0
2001	3,500,000	100	3,500,100	70,000	1,700,100	1,730,000	0
United States							
1999	687,646	383,672	1,071,318	238,987	528,781	158,760	144,790
2000	701,254	469,749	1,171,003	290,309	556,114	145,152	179,428
2001	725,748	414,000	1,139,748	321,705	533,869	135,000	149,174
Subtotal							
1999	6,734,461	479,219	7,213,680	1,175,279	3,617,151	2,270,260	150,990
2000	6,963,002	592,039	7,555,041	1,310,770	3,773,503	2,288,140	182,628
2001	6,850,948	551,600	7,402,548	1,326,725	3,681,649	2,244,000	150,174
Southern Hemisphere Countries							
Chile							
1999	815,000	97	815,097	473,525	93,000	248,572	0
2000	935,000	16	935,016	596,000	95,000	244,016	0
2001	955,000	50	955,050	580,000	96,000	279,050	0
South Africa; Republic of							
1999	227,671	0	227,671	183,716	39,378	4,577	0
2000	218,410	0	218,410	186,410	30,000	2,000	0
2001	220,000	0	220,000	186,500	31,000	2,500	0
Subtotal							
1999	1,042,671	97	1,042,768	657,241	132,378	253,149	0
2000	1,153,410	16	1,153,426	782,410	125,000	246,016	0
2001	1,175,000	50	1,175,050	766,500	127,000	281,550	0
Total Selected Countries							
1999	7,777,132	479,316	8,256,448	1,832,520	3,749,529	2,523,409	150,990
2000	8,116,412	592,055	8,708,467	2,093,180	3,898,503	2,534,156	182,628
2001	8,025,948	551,650	8,577,598	2,093,225	3,808,649	2,525,550	150,174

1/ Calendar year for all countries.

2/ U.S. production data represents California only.

3/ U.S. exports and imports are from the Bureau of the Census with forecasts by the USDA/Foreign Agricultural Service.

TABLE GRAPES: U.S. EXPORTS 1/

Destination	1996	1997	1998	1999	2000	Jan-Aug '00	Jan-Aug '01	Jan-Aug '01/'00
				---Metric Tons---				-- % Change --
Canada	87,042	97,396	81,505	89,508	95,532	35,967	33,696	-6%
Hong Kong	38,547	58,548	31,569	37,017	35,370	12,294	16,412	33%
Malaysia	5,858	7,551	3,005	3,589	10,997	1,662	14,283	759%
Mexico	10,859	23,920	24,007	30,881	40,187	5,910	4,485	-24%
United Kingdom	4,412	5,609	6,934	8,762	11,258	4,394	4,382	-0%
Philippines	12,734	15,903	6,411	14,066	13,376	3,504	4,228	21%
Taiwan	16,326	11,962	8,756	16,629	20,428	3,680	3,712	1%
Singapore	4,575	5,357	4,631	3,651	6,584	2,201	3,284	49%
Indonesia	4,873	5,316	601	1,904	4,328	982	1,546	57%
China	28	454	5,680	928	9,105	1,830	1,520	-17%
All Others	29,461	38,633	32,153	32,052	43,144	5,792	8,265	43%
Total	**214,715**	**270,649**	**205,252**	**238,987**	**290,309**	**78,216**	**95,813**	**22%**

TABLE GRAPES: U.S. IMPORTS 1/

Origin	1996	1997	1998	1999	2000	Jan-Aug '00	Jan-Aug '01	Jan-Aug '01/'00
				---Metric Tons---				-- % Change --
Chile	292,896	272,333	289,233	274,935	359,678	322,324	290,470	-10%
Mexico	60,033	75,713	101,044	87,632	90,749	90,690	77,561	-14%
Argentina	0	0	286	630	2,392	2,392	5,242	119%
South Africa; Rep	3,218	7,450	10,122	13,591	10,393	10,393	2,443	-76%
Peru	254	75	0	55	265	103	517	402%
Italy	194	1,142	958	843	1,492	65	113	74%
Brazil	0	12	0	41	329	299	31	-90%
Canada	2,945	3,202	4,152	5,910	4,447	0	12	n/a
All Others	286	1	26	35	0	2	0	-100%
Total	**359,826**	**359,928**	**405,821**	**383,672**	**469,749**	**426,268**	**376,389**	**-12%**

1/ Calendar year for all countries.

SOURCES: U.S. Agricultural Attaché Reports and Bureau of the Census with forecasts by the Foreign Agricultural Service/USDA.